

The FM Procurement Playbook:

Balancing ESG, Risk and Cost -
Without Losing Control



Contents

Section One

Procurement at a Crossroads: The New FM Mandate

- Case Snapshot: Leading UK Property Management Company
- Case Snapshot: Clarion Housing Group

Section Two

Strategic Procurement in FM: From Cost Control to Value Creation

- Case Snapshot: Mitie Group - From Cost Saving to Value Creation

Section Three

Understanding the ESG-Risk-Cost Triangle

- Decision-Making Considerations

Section Four

Applying ISO 20400: Operationalising Sustainable FM Procurement

- Implementation Guidance
- Case Snapshot: NHS Shared Business Services - FM Framework

Section Five

Segmenting Suppliers with the Kraljic Matrix in FM

Section Six

Applying COSO ERM and Third-Party Controls

- Risk Management Process (COSO-Aligned)
- Case Snapshot: UK Local Authority - Contractor Risk Framework

Section Seven

Total Cost of Ownership in FM: Moving Beyond Upfront Cost

- TCO Categories

Section Eight

Standardisation and Control: Supplier Onboarding & Vetting Frameworks

- Recommended Framework Components
- Case Snapshot: Leading Property Group - Supplier Onboarding Efficiency

Section Nine

Using Digital Tools to Drive Transparency and Compliance

Section Ten

Metrics That Matter: Procurement KPIs for Modern FM Teams

- Core KPI Categories for FM Procurement
- Key Insight

Section Eleven

Governance, Policy, and Executive Accountability

- Case Insight: NHS Property Services - Procurement Governance

Section Twelve

Next Steps

Section Thirteen

Toolkits, Checklists and Templates

Procurement at a Crossroads: The New FM Mandate

Procurement in the property and facilities management (FM) sector is undergoing a structural transformation. No longer confined to cost containment, FM procurement leaders must now integrate environmental, social, and governance (ESG) goals, manage increasingly complex supply chain risks, and provide transparency across operations, all while maintaining commercial performance.

This shift is driven by converging factors:

- Net Zero targets and Scope 3 emissions accountability.
- Evolving regulatory obligations (e.g., CSRD, Procurement Act 2023, Modern Slavery Act).
- A growing outsourced supplier base in FM, increasing third-party risk.
- Rising stakeholder expectations around ethical and sustainable sourcing.

According to [McKinsey](#), up to 90% of an organisation's environmental impact stems from its supply chain, a figure especially relevant to FM organisations where services are delivered through multi-tiered contractor ecosystems.

In this environment, FM procurement is

no longer a transactional function. It is a strategic enabler of value that sits at the intersection of compliance, reputation, cost, and sustainability.

This playbook responds to the urgent need for procurement leaders in FM to take control of a more complex and accountable sourcing environment. It equips them with frameworks, tools, and use cases to answer the following key questions:

- How do we select suppliers who align with our ESG goals without incurring unnecessary costs?
- How do we balance long-term sustainability with short-term service continuity?
- How do we mitigate third-party risk without slowing down procurement processes?

FM leaders need to lead a shift from reactive to proactive, insights-driven procurement. That means adopting sustainable procurement frameworks like ISO 20400, segmenting suppliers by value and risk using the Kraljic Matrix, embedding risk controls through COSO ERM, and using tools like TCO (Total Cost of Ownership) to justify investments beyond initial price.

The end goal? A procurement function that not only secures FM service delivery but builds organisational resilience, reduces regulatory exposure, and contributes directly to strategic ESG targets.

For detailed tools, templates and implementation frameworks referenced in this section, see [Section 13: Toolkits and Templates](#).

Case Snapshot: Leading UK Property Management Company

A major UK property management firm used Achilles to improve supplier onboarding speed and standardisation across its FM categories. By introducing structured supplier prequalification and third-party assurance checks, onboarding time was reduced, and the company gained visibility into compliance documentation across its supply base.

Source: [Achilles Case Study](#)

Case Snapshot: Clarion Housing Group

Clarion Housing Group, another of Achilles' customers works with over 3,000 suppliers and contractors, including major FM service providers such as Engie, Wates, and United Living. According to its publicly available Sustainability & Procurement statement, Clarion mandates supplier assurance and adherence

to ethical sourcing through a registered code of conduct. Suppliers must complete due diligence and achieve recognised accreditation, such as Silver+ status via Achilles before appointment. This graded onboarding approach supports stronger oversight and streamlines processing for lower-risk service.

Source: [Clarion Annual Report 24/25](#)

Strategic Procurement in FM: From Cost Control to Value Creation

FM procurement teams have historically focused on driving down operating costs through competitive tendering and short-term contracts. While this model delivered savings on paper, it often introduced unintended consequences-service quality degradation, increased supplier churn, and missed opportunities to reduce total lifecycle cost. Today, leading FM and property organisations are moving beyond cost control to embrace procurement as a lever for long-term value creation.

This shift reflects a more strategic procurement posture, one that prioritises risk resilience, ESG performance, and supplier partnership alongside financial efficiency. According to [Deloitte's 2023 Global Chief Procurement Officer Survey](#), 72% of CPOs now identify supplier collaboration and innovation as key to future procurement success.

Strategic procurement in FM is not about abandoning savings. It's about aligning cost decisions with wider business outcomes: reducing carbon, safeguarding compliance, improving tenant satisfaction, and enabling operational continuity. This mindset reframes cost as one part of a value equation that considers risk avoidance, supplier capability, and ESG outcomes.

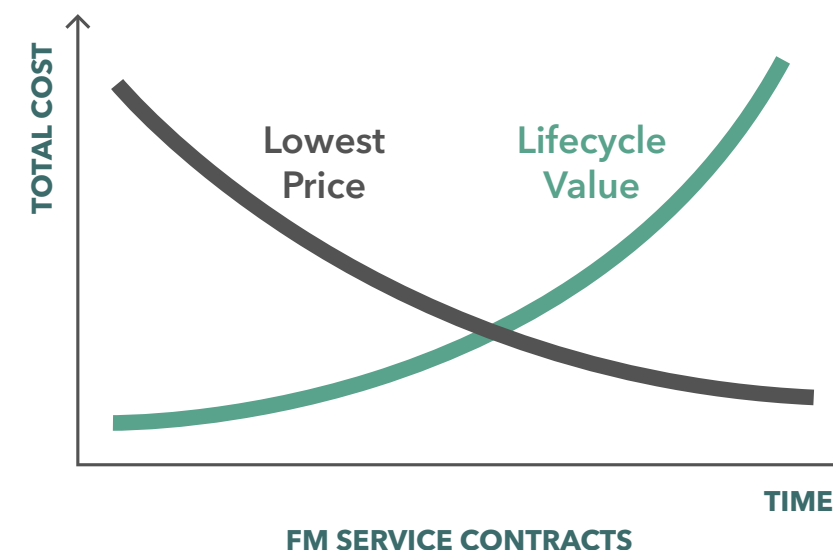
For FM procurement leaders, this means:

- Elevating procurement to an enterprise-level strategic function.
- Factoring lifecycle cost (TCO) into sourcing models.
- Engaging with suppliers as long-term value partners.
- Incentivising innovation, not just price competition.
- Embedding ESG, compliance, and resilience into award criteria.

These outcomes require greater collaboration across departments-risk, finance, operations, and sustainability, and a shared framework to evaluate supplier contributions beyond unit price.

For detailed tools, templates and implementation frameworks referenced in this section, see [Section 13: Toolkits and Templates](#).

TCO Value Curve



Case Snapshot: Mitie Group - From Cost Saving to Value Creation

Mitie Group, one of the UK's largest FM providers, shifted from price-based tendering to a value-based sourcing model across key contracts. In its ESG and procurement strategy, Mitie introduced performance-based

KPIs, including energy usage, staff wellbeing, and social value delivery. By using a Total Cost of Ownership (TCO) approach and embedding sustainability metrics into contract awards, Mitie reported a 12% reduction in energy consumption across client portfolios and strengthened client retention through improved service outcomes.

Source: [Mitie Group ESG Report 2023](#)

Understanding the ESG-Risk-Cost Triangle

Procurement professionals in FM and property management have to navigate complex trade-offs between cost efficiency, ESG performance, and risk resilience. These three forces- cost, ESG, and risk are interdependent and often in tension. Procurement decisions that prioritise one dimension can unintentionally compromise another unless managed with transparency, insight, and structure.

This relationship is best visualised as a triangle:

- **ESG Goals** face pressure from sustainability commitments, emissions reporting, and stakeholder expectations.
- **Risk Resilience** is influenced by operational continuity, regulatory compliance, and third-party governance.
- **Cost Efficiency** is driven by budget constraints, ROI accountability, and procurement targets.

Effective FM procurement requires continuous balancing within this triangle. The aim is not to eliminate tension, but to navigate it strategically. The ESG–Risk–Cost triangle provides a decision-making lens that helps:

- Evaluate trade-offs when awarding contracts.
- Justify spend on long-term value versus short-term savings.

- Identify high-risk suppliers that jeopardise ESG or compliance outcomes.
- Prioritise procurement actions that support overall resilience.

Over-optimising for one dimension can introduce risk elsewhere. For example:

- Choosing the lowest-cost provider may lead to poor ESG performance or contractor non-compliance.
- Overweighting ESG credentials without financial scrutiny can reduce ROI and strain budgets.
- Focusing solely on regulatory risk can lead to missed opportunities for innovation and social value.

Procurement leaders should adopt structured frameworks that integrate all three areas into sourcing models, including:

- **Weighted evaluation matrices** with embedded ESG and risk criteria.
- **TCO assessments** that model lifecycle impacts (not just upfront cost).
- **Supplier segmentation** aligned with both sustainability and risk exposure.

This approach ensures that ESG progress doesn't come at the expense of compliance or financial stability and vice versa.

Decision-Making Considerations

Procurement teams navigating the ESG–Risk–Cost triangle should reflect on:

- **Are cost savings today increasing exposure tomorrow?**
For example, does a low-cost contractor lack the ESG credentials needed for compliance or stakeholder assurance?
- **Are we applying the right weightings to each contract type?**
High-risk or high-impact services (e.g. fire safety, waste management) may

warrant heavier ESG or compliance scoring than soft services.

- **Are we integrating real-world data into supplier evaluation?**
Using tools like risk scoring, emissions baselines, or audit history helps quantify decision trade-offs.

For detailed tools, templates and implementation frameworks referenced in this section, see Section 13: Toolkits and Templates.



Applying ISO 20400: Operationalising Sustainable FM Procurement

ISO 20400 is the internationally recognised guidance standard for sustainable procurement. For facilities and property management teams, it offers a practical roadmap to embed sustainability into procurement decisions without losing sight of commercial or compliance priorities. The standard is not a checklist but a strategic integration model, helping procurement functions align buying decisions with ESG outcomes, risk controls, and long-term value.

Unlike more prescriptive standards, ISO 20400 is adaptable to FM's decentralised and outsourced supply chain landscape. It provides principles, guidance, and governance models that help:

- Establish internal alignment on what sustainable procurement means for the organisation.
- Translate sustainability goals into procurement criteria and procedures.

- Engage suppliers with clear expectations and performance metrics.
- Monitor and improve sustainable procurement outcomes over time.

For FM and property professionals, ISO 20400 is particularly useful in:

- Supplier selection and onboarding (e.g., incorporating ESG scoring).
- Setting evaluation criteria for FM service contracts.
- Defining performance indicators that go beyond price and SLA compliance.
- Improving transparency and audit readiness for regulators or investors.

By embedding ISO 20400 into FM procurement processes, organisations gain a framework that supports consistency, accountability, and defensible sourcing decisions.



Implementation Guidance

Key elements of ISO 20400 relevant to FM procurement include:

- **Governance & Policy Alignment**
Ensure sustainability and procurement objectives are mutually reinforcing. This includes having executive sponsorship and a cross-functional working group to define what sustainable procurement looks like for FM.
- **Spend and Risk Analysis**
Identify FM categories with the highest ESG and reputational impact (e.g. M&E services, cleaning, waste management).
- **Integration into Processes**
Adapt procurement templates and RFPs to include clear sustainability clauses, weighting, and performance expectations.
- **Supplier Engagement and Development**
Use pre-qualification schemes and platforms (e.g. Achilles) to ensure FM suppliers meet baseline ESG and compliance criteria and offer capacity-building to those with potential.
- **Monitoring & Reporting**
Regularly review supplier ESG performance using consistent KPIs (e.g. emissions, social value, audit results). Integrate reporting into wider business dashboards.



Steps to implement ISO 2040

Case Snapshot: NHS Shared Business Services - FM Framework

NHS SBS integrated ISO 20400 principles into its FM procurement framework to align with NHS-wide net zero goals. It introduced sustainability-weighted scoring in tenders and required bidders

to demonstrate social value contributions and carbon reduction strategies. The result was a more resilient supplier base and improved alignment between procurement, estates teams, and sustainability leads.

Source: [NHS SBS FM Procurement Framework Overview – 2023](#)

Segmenting Suppliers with the Kraljic Matrix in FM

Facilities and property management teams often oversee a wide and complex supplier ecosystem, from cleaning and landscaping to technical M&E and compliance contractors. Managing all suppliers with the same procurement intensity is inefficient and unsustainable. The Kraljic Matrix offers a powerful segmentation model to prioritise procurement effort based on supply risk and strategic importance.

Originally published in Harvard Business Review (1983), the Kraljic Matrix remains one of the most widely used frameworks in procurement. In FM, it helps buyers:

- Identify suppliers that are critical to service continuity, safety, or compliance.
- Differentiate commodity services (e.g., waste removal) from strategic partners (e.g., fire safety).
- Allocate procurement resources (e.g., audits, onboarding checks) where they deliver the greatest return.

The matrix plots suppliers on two axes:

- **Supply Risk** (availability, contractor concentration, regulatory exposure).
- **Impact on Operations** (spend volume, service criticality, ESG significance).

Suppliers are grouped into four quadrants:

- **Non-Critical (Low Risk, Low Impact)** – e.g., ad hoc repair services.
- **Leverage (Low Risk, High Impact)** – e.g., cleaning contractors with high site volume.
- **Bottleneck (High Risk, Low Impact)** – e.g., single-source lift maintenance providers.
- **Strategic (High Risk, High Impact)** – e.g., life safety, HVAC, asbestos management.

By mapping FM suppliers into these quadrants, procurement teams can:

- Apply enhanced vetting and ESG scoring to strategic suppliers.
- Identify opportunities for demand aggregation or standardisation.
- Reduce over-compliance effort for low-risk services.
- Inform decisions on contract duration, supplier development, or exit planning.

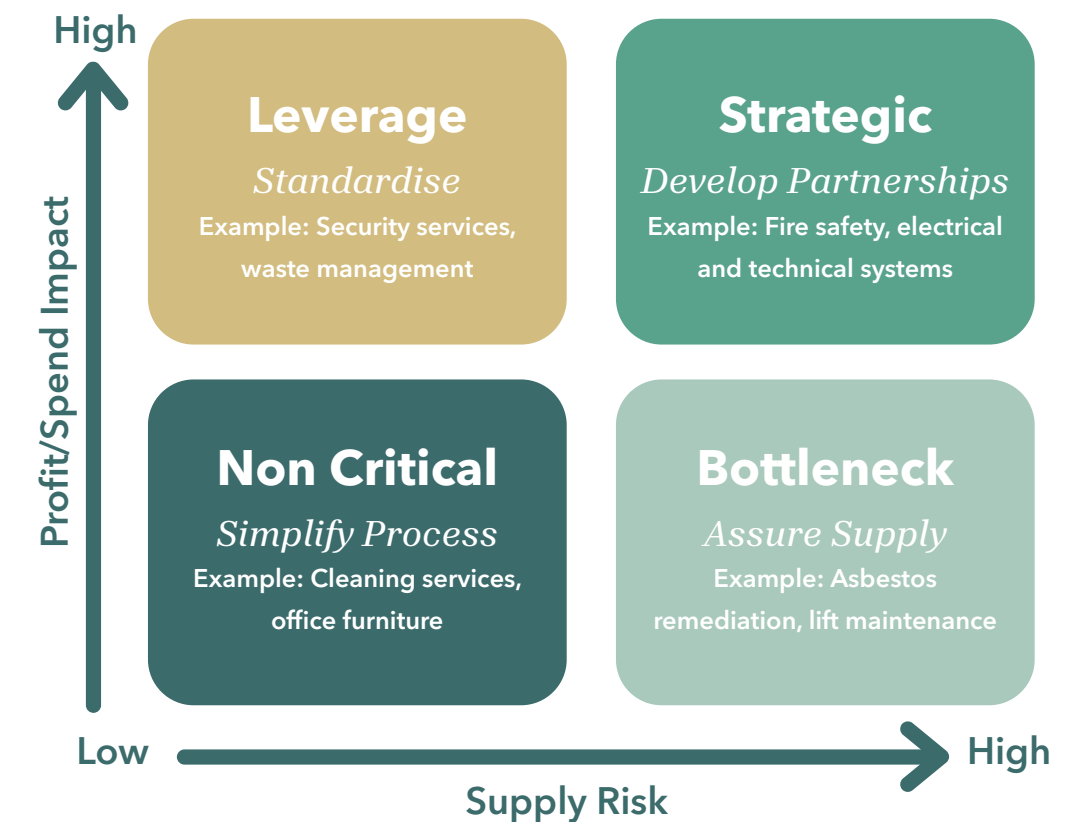
This structured approach helps balance due diligence intensity with contract risk exposure, while aligning supplier management to the ESG–risk–cost triangle discussed earlier.

Practical Use in FM Procurement

Kraljic segmentation works particularly well for FM when paired with operational insights. FM teams should:

- Conduct a risk and spend review across their supplier database.
- Map services into the matrix collaboratively with estates, compliance, and sustainability leads.
- Use segmentation to tier onboarding requirements, insurance thresholds, and audit cycles.

For example, a fire alarm system contractor in a high-rise building with vulnerable occupants would score high on both axes. This supplier should receive enhanced vetting, performance-linked KPIs, and scheduled risk reviews. By contrast, window cleaning contractors may fall into a leverage or non-critical tier, still important, but manageable with standardised onboarding.



Case Snapshot: Transport for London - Tiered Supplier Risk Model

Transport for London (TfL) developed a supplier segmentation approach aligned to risk, service impact, and contract size as part of its wider commitment to responsible procurement. High-risk suppliers in safety-critical environments undergo enhanced onboarding and risk scoring using external validation tools. Lower-

risk suppliers follow streamlined processes to reduce administrative burden while maintaining governance standards.

This model reflects principles outlined in public sector procurement frameworks and has been cited in UK government guidance, including TfL's Supplier Code of Conduct and Social Value Framework.

TfL Responsible Procurement & Social Value

Applying COSO ERM and Third-Party Controls

In FM procurement, third-party supplier risk has a direct impact on day-to-day operations. Contractors often work on-site and deliver critical services. If they fail to meet safety, regulatory, or financial standards, the consequences can include service disruption, compliance breaches, and reputational harm.

The COSO ERM Framework provides an established structure to manage enterprise risk, including risks arising from third-party

suppliers. It helps FM procurement teams embed risk thinking into every stage of the supplier lifecycle, from selection to monitoring to exit.

In the FM context, COSO ERM helps address:

- Health and safety risk from contractor non-compliance.
- Regulatory exposure (e.g. fire safety, Legionella, CDM regulations).

- Financial and operational continuity risk (e.g. supplier insolvency).
- ESG-related risk (e.g. modern slavery, emissions, social impact).

By adapting COSO ERM's core principles, FM teams can:

- Build structured onboarding that includes risk categorisation.
- Implement tiered controls based on supplier exposure.

- Strengthen documentation and audit trails.
- Improve cross-functional governance with estates, risk, and sustainability leaders.

COSO's model emphasises the integration of risk into strategic and operational decision-making. For FM procurement, this means viewing supplier decisions not just through a commercial lens, but as a shared risk responsibility.

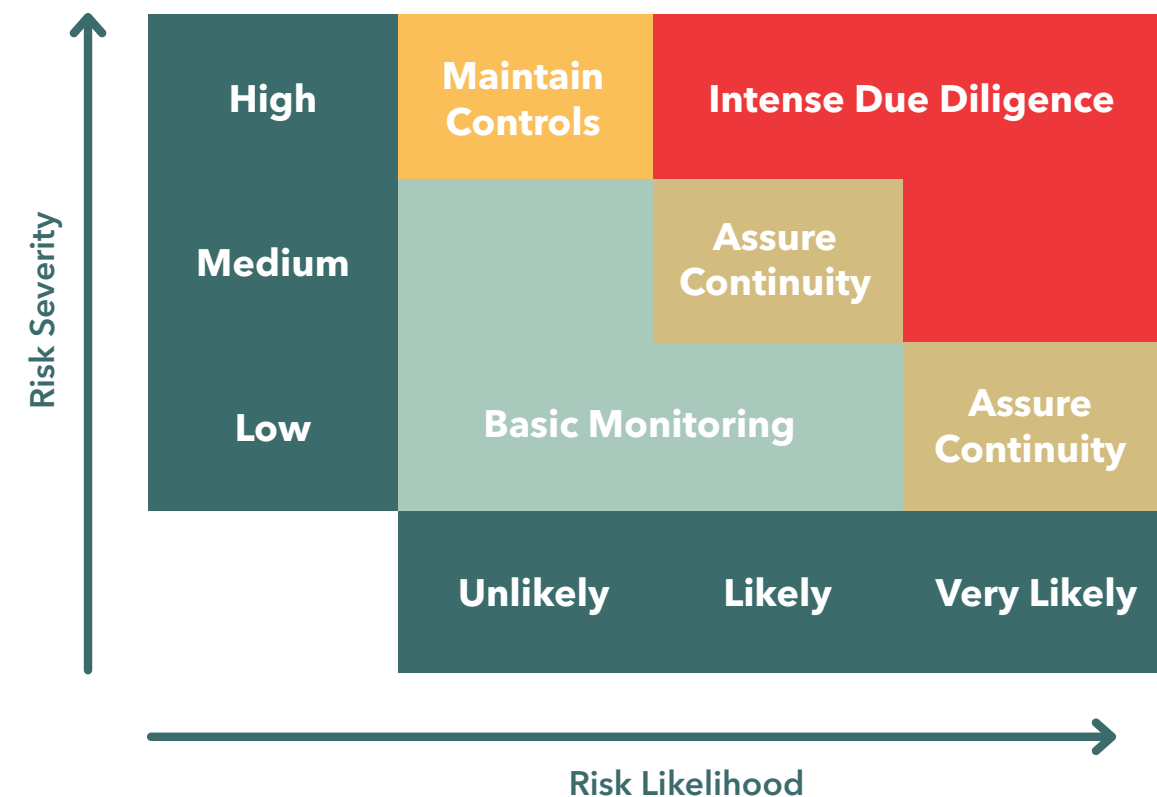
Risk Management Process (COSO-Aligned)

The following third-party risk process aligns with COSO ERM principles:

- 1. Risk Assessment**
Identify supplier-specific risks based on service, site, and compliance needs.
- 2. Due Diligence**
Collect and validate relevant data: insurance, accreditations, financials, ESG policies.
- 3. Contractual Controls**
Embed specific clauses, SLAs, and penalties tied to risk exposure.
- 4. Ongoing Monitoring**
Track performance, incidents, and changes in supplier status.
- 5. Issue Remediation**
Define escalation protocols, corrective actions, and formal reviews.

Each step should be documented, repeatable, and tailored to the supplier tier. This structure supports both operational readiness and regulatory compliance.

See Section 13: Toolkits and Templates for the full Supplier Risk Heatmap and guidance on applying it to contract strategy.



Case Snapshot: UK Local Authority - Contractor Risk Framework

A UK local authority managing over 300 FM suppliers implemented a risk-based supplier onboarding model. High-risk contractors (e.g., gas servicing, fire protection) were required to undergo deeper vetting, demonstrate competence via third-party audits, and commit to regular HSEQ reporting. Low-

risk suppliers (e.g., grounds maintenance) completed a leaner, self-certification process. The model enabled faster onboarding, improved audit readiness, and reduced reactive issue management.

This structured approach was modelled on COSO principles and adapted to local procurement governance requirements.

Total Cost of Ownership in FM: Moving Beyond Upfront Cost

Procurement teams in facilities and property management often face pressure to award contracts based on lowest initial cost. While this approach may satisfy short-term budget constraints, it frequently fails to account for hidden expenses, risk exposure, or long-term inefficiencies. A Total Cost of Ownership (TCO) approach provides a more strategic lens—one that considers the full lifecycle cost of a service, system, or supplier relationship.

TCO models evaluate not just the price on the contract, but the cost of:

- Procurement and onboarding.
- Performance monitoring and issue resolution.
- Maintenance and repairs.
- Supplier switching and retraining.
- Regulatory non-compliance and service failure.

In FM, these indirect costs can quickly outweigh the savings of a low-cost bid—particularly for essential services like HVAC, cleaning, or fire safety. TCO helps procurement teams balance upfront costs with risk mitigation, performance, and value.

By embedding TCO into procurement decision-making, FM teams can:

- Make better contract length and renewal decisions.
- Justify investments in higher-quality or ESG-aligned suppliers.
- Reduce reactive maintenance and emergency spend.
- Strengthen supplier accountability through KPIs tied to lifecycle performance.



TCO Categories

Category	Description	Examples
Acquisition Costs	Sourcing, vetting, onboarding, and contract award	Procurement time, legal fees, mobilisation costs
Operational Costs	Costs incurred during ongoing service delivery	Staff time, utilities, issue resolution, audit effort
Performance Risk Costs	Potential costs due to service failure or poor delivery	Emergency repairs, rework, SLA breaches
Compliance & Reputation Costs	Costs linked to non-compliance, accidents, or ESG failures	Fines, legal disputes, negative media, tenant complaints
End-of-Life Costs	Costs to terminate, replace, or transfer the supplier	Exit fees, supplier transition, knowledge loss

Detailed TCO breakdown templates and supplier comparison models are available in Section 13: Toolkits and Templates.

Standardisation and Control: Supplier Onboarding & Vetting Frameworks

Without consistent onboarding and vetting frameworks, FM procurement teams expose their organisations to unnecessary risk, delays, and compliance failures. When supplier assessments vary across contracts or regions, teams lose visibility and accountability and suppliers experience duplicated effort.

Standardisation enables organisations to:

- Apply the right level of scrutiny to each supplier.
- Reduce friction and repetition across sites or departments.
- Maintain clear records for audit and regulatory checks.
- Improve supplier experience, transparency, and time to mobilisation.

A strong onboarding and vetting framework typically includes:

- Defined tiers of supplier criticality.
- Clear requirements by tier (e.g. insurance, certifications, ESG data).
- A single source of truth for supplier data and documentation.
- Digital processes to enable status tracking, reminders, and expiry alerts.

In FM environments, this framework should accommodate both high-risk, high-compliance suppliers (e.g. life safety, gas servicing) and lower-risk service categories (e.g. grounds maintenance). The goal is not to overburden suppliers, but to ensure consistency, visibility, and defensibility.

Recommended Framework Components

Component	Purpose	Example Outputs
Supplier Segmentation	Classify suppliers by risk and impact	Critical vs. non-critical tiering
Onboarding Requirements Matrix	Tailor onboarding documentation by tier	HSE data, insurance, financials, ESG policies
Digital Workflow	Track onboarding status, automate follow-ups	Supplier dashboard, alerts, renewal dates
Central Repository	Maintain verified documents in one location	Shared document vault, audit trail access

Case Snapshot: Leading Property Group - Supplier Onboarding Efficiency

A large international property group worked with Achilles to implement a risk-based supplier onboarding framework. By digitising supplier data capture, automating document checks,

and segmenting onboarding requirements based on supplier risk profile, the team accelerated time to approval and improved supplier compliance visibility across their FM network.

This example reflects a real project delivered by Achilles and anonymised for publication purposes.

[Read case study](#)

Using Digital Tools to Drive Transparency and Compliance

Digital tools play an important role in enabling FM procurement teams to move from reactive management to proactive control. Manual processes, whether spreadsheets, email-based onboarding, or fragmented document storage can no longer support the scale, speed, and complexity of modern property portfolios.

By using purpose-built procurement platforms and analytics tools, FM teams can:

- Ensure supplier documentation is current and accessible.
- Track performance and incident trends across suppliers and sites.

- Flag risks early and automate reminders for renewals or non-compliance.
- Benchmark suppliers against industry peers or ESG criteria.

Digital transformation in FM procurement is not about replacing people, it's about giving teams the visibility and data they need to make defensible, timely decisions.

Organisations using the [Achilles platform](#) benefit from pre-qualified supplier data, automated alerts, and built-in risk scoring tools helping reduce compliance gaps and accelerate procurement cycles.



A digital procurement and supply chain management ecosystem includes all the data needed and one source of truth.

Key Insight

According to Deloitte’s Global CPO Survey 2023, only 15% of procurement leaders say their teams effectively track ESG metrics. Yet ESG performance is one of the top five priorities for CPOs globally.

Deloitte 2023 Global CPO Survey

Metrics That Matter: Procurement KPIs for Modern FM Teams

FM procurement is no longer just about purchasing services—it’s about managing risk, driving ESG progress, and ensuring operational continuity. To measure effectiveness and secure ongoing investment, procurement teams must track KPIs that align with wider organisational goals.

While traditional metrics like cost savings remain important, FM leaders increasingly prioritise indicators such as supplier compliance rates, carbon impact, and onboarding cycle times. The right metrics help teams:

- Demonstrate procurement’s contribution to ESG, compliance, and risk reduction.
- Identify process inefficiencies and supplier performance gaps.
- Benchmark against peers or contractual expectations.
- Build the business case for tools, training, and process upgrades.

Crucially, KPIs should be tiered by supplier category or contract value. A one-size-fits-all model can dilute insight and overburden both buyers and suppliers.

Core KPI Categories for FM Procurement

KPI Category	Example Metrics	What It Reveals
Efficiency	Time to onboard supplier, contract cycle time	Process bottlenecks, automation opportunities
Compliance	% of suppliers with valid documentation	Exposure to audit risk or policy breach
ESG & Sustainability	% of spend with ESG-qualified suppliers, emissions	Alignment with net-zero and social value commitments
Performance	SLA adherence rate, incident resolution time	Supplier reliability and impact on service delivery
Risk Management	Suppliers flagged as high-risk	Effectiveness of segmentation and monitoring controls

Governance, Policy, and Executive Accountability

Procurement doesn't operate in a vacuum. For FM organisations to achieve consistent performance, compliance, and sustainability outcomes, governance and accountability structures must align across procurement, estates, finance, and executive leadership.

Without clear ownership, policies become disconnected from delivery and supplier risk goes unmanaged.

Establishing procurement governance ensures that:

- Policies and standards are consistently applied across business units and regions.
- ESG, safety, and commercial policies are embedded in onboarding and contract workflows.
- Executives remain accountable for performance and risk outcomes.
- Procurement decisions are traceable, auditable, and defensible.

Executive accountability doesn't require micromanagement. It means setting policy, reviewing reporting, and supporting the teams managing supplier engagement on the ground.

Organisations should define roles across three levels:

- 1. Strategic**
Set direction, approve policy, and review enterprise-wide risk and ESG performance.
- 2. Operational**
Ensure policies are translated into processes, tools, and compliance checkpoints.
- 3. Tactical**
Manage supplier relationships and day-to-day performance monitoring.

Strategic: Board, CPO, CFO

Operational: Senior procurement leads

Tactical: Procurement managers, estate teams

Three-tiered governance model

Case Insight: NHS Property Services - Procurement Governance

NHS Property Services established a national procurement policy to improve compliance, transparency, and risk control across its FM

network. The framework includes mandatory supplier onboarding checks, data transparency requirements, and executive-level risk reporting across estates and commercial teams.

[NHS Property Services Annual Report 2022–23](#)

Next Steps

Procurement leaders in FM and property have a unique opportunity to drive operational resilience, cost efficiency, and ESG performance.

Achilles supports leading organisations with data-driven tools, supplier insights, and governance models that turn procurement from a cost centre into a value engine.

This playbook equips you with the frameworks, Achilles can help you scale them.

Learn more about how we support Facilities and property management organisations.



Toolkits, Checklists and Templates

These tools are designed to help procurement, FM, and sustainability leaders take immediate action.

Tool / Framework	Description	Use Case	Link / Source
ISO 20400	Framework for embedding sustainability into procurement	Applies across ESG–risk–cost triangle	ISO 20400
TCO Model	Total lifecycle cost assessment of FM services	Used in long-term supplier selection	TCO and Scenario Template
COSO ERM	Risk framework for enterprise and third-party oversight	Helps evaluate supplier and regulatory risk	COSO ERM
Kraljic Matrix	Supplier segmentation based on risk and strategic importance	Helps prioritise supplier engagement and scrutiny	HBR, Kraljic (1983)
Supplier Risk Heatmap	Visual Risk Assessment Framework	Prioritise suppliers for due diligence, onboarding intensity, and contract oversight based on their likelihood of failure and impact on operations	Heatmap Template
Weighted Evaluation Matrix	Template for scoring suppliers across ESG, risk, and cost	Used in tender decision-making	Evaluation Matrix



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